

**City Council Members**

Chuck Bradley  
Millie Butcher Conway  
Polly Singer Eardley  
David Lusby



**City Council Members**

Mark Showalter  
Connie Tackett  
Karen Tingle-Sames  
Marvin Thompson

**TOM PRATHER, MAYOR**

**REQUEST FOR PROPOSALS  
Customer Relationship Management (CRM) Software  
OPENING:  
JANUARY 12, 2017 at 10:00AM EST**

**SCOPE**

**The City of Georgetown is seeking proposals for Customer Relationship Management (CRM) software services to help the City and County manage and analyze citizen interactions with the goal of improving relationships, assisting citizens better and increasing internal work efficiency.**

**GENERAL COMPLIANCE**

NOTE TO PROPOSERS: Proposal submission does not constitute an agreement or a contract with the City of Georgetown.

NO RESPONSE: Proposers unable or unwilling to submit a proposal should immediately return the "Proposer Response Form" only with "No Response" marked clearly on the outside of the envelope. Any proposer not submitting a proposal is encouraged to indicate the reason(s) for not participating.

ALTERNATE PROPOSALS: It is not the intention of the specifications contained herewith to eliminate any proposer; however, quoted items must equal or exceed stated specifications.

INDICATION OF COMPLIANCE: The proposer shall indicate compliance with either a "Yes" or a "No" for each item specification. Blank spaces shall be considered non-compliance. Any deviation from the specification or where submitted literature does not fully support meeting the specification(s) must be clearly cited on the attached page labeled "EXCEPTIONS TO PROPOSAL SPECIFICATIONS AND/OR COMMENTS." No deviation below "minimum" specifications will be accepted.

Additional Information: While not necessary, the proposer may include any product brochures, software documentation, sample reports, or other documentation that may assist the City of Georgetown in better understanding and evaluating the proposer's response. Additional documentation shall not serve as a substitute for other documentation which is required by the Request for Proposals (RFP) to be submitted with the proposal.



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At the time of submission, each proposer will be presumed to have inspected the site(s), if necessary, and to have read the scope and to be thoroughly familiar with the project plans and contract documents (including any and all addenda). The failure or omission of any proposer to examine any form, instrument, or document shall in no way relieve any proposer from any obligation with respect to this proposal.

All proposals and submitted information becomes the property of the City of Georgetown and will not be returned to the proposer.

**PROPOSAL SUBMISSION:** All pages of the original signed hardcopy shall be initialed in ink on the lower right-hand corner. Typed quotation sheets are preferred; however, if hand written, the sheets must be legible and in ink. Any pricing information that is illegible may result in the rejection of the proposal.

The proposer must submit one original signed hardcopy, and three (3) duplicates. These must be sealed in a container with the project name, the proposer's name, and the opening date clearly marked on the outside of the container. The cover of the original proposal should be marked "Original" and the covers of the duplicates should be marked "Copy." The proposal shall be addressed and delivered to City Clerk, 100 North Court Street, Georgetown, KY 40324 prior to proposal opening.

ANY PROPOSALS NOT RECEIVED PRIOR TO THE SCHEDULED OPENING DATE AND TIME WILL BE REJECTED AND RETURNED UNOPENED.

**FAILURE TO SUBMIT REQUIRED DOCUMENTATION:** Failure to submit ALL forms and information required in this RFQ may be grounds for disqualification.

**LIABILITY:** City of Georgetown is not liable for any expenses incurred in connection with the preparation of proposals.

**METHOD OF PROCUREMENT:** Shall be in conformance with Purchasing Policies as adopted by the City Council for the City of Georgetown, Kentucky. A copy of the City's Purchasing Policy is available on the City's website at [www.georgetownky.gov](http://www.georgetownky.gov) (Finance Department).

**KENTUCKY OPEN RECORDS LAW:** At the time a proposal is submitted to the City, proposer shall identify any information that is submitted as part of the proposal that is proprietary or confidential in nature and not subject to release for public inspection. The City of Georgetown will protect any proprietary or confidential information to the extent allowable under the Kentucky Open Records Act.

**NEW GOODS, FRESH STOCK:** Unless otherwise specifically stated, all Contractors shall provide new commodities, fresh stock, latest model, design or package.

**COMPLIANCE WITH LAWS AND REGULATIONS:** Each proposer shall comply with all Federal, State & Local regulations concerning this type of service.

**METHOD OF AWARD:** The award will be based upon the weighted evaluation criteria established in the request, and upon the lowest responsive (compliance with

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specifications) and responsible proposer meeting specifications on each item. The City of Georgetown reserves the right to consider as a part of the proposal evaluation the stated warranty, stated delivery schedule, service, features, upgrades and payment terms.

The City of Georgetown reserves the right to reject any and all proposals, to award any proposal in whole or in part, and/or to waive any irregularities or minor immaterial defects in any and all proposals. The right is also reserved to award proposals based on the best interest and/or most advantageous to the City. The City of Georgetown may also consider any alternative proposal that meets its basic needs.

**PRICING:** All prices shall be quoted exclusive of any taxes. The City of Georgetown is exempt from Federal excise, transportation and/or Kentucky sales tax. Any items supplied directly to the City from a supplier/manufacturer are exempt from sales tax. Any items purchased by a contractor that will be used in the fulfillment of a contract are not exempt from sales tax.

In case of a discrepancy in the extension of a unit price, the unit price shall govern the total price.

Proposers must provide manufacturer's product literature if available and appropriate with the proposal submission.

Proposals shall remain firm and open to acceptance by the City of Georgetown for a minimum period of sixty (60) days after the proposal opening. If the time period has expired the City of Georgetown could request a letter from proposers asking to extend the time period.

**STANDARD AGREEMENT:** The selected Proposer will be required to sign a Standard Agreement for Goods and Services with the City within 14 days of the Notice of Award. The agreement will contain terms and conditions that include duration of the agreement, sworn statement regarding campaign finance laws, a provision indicating that the proposer and its employees or agents are not employees of the City, a termination clause, an additional termination clause of those agreements covering multiple fiscal years in the event that sufficient funds are not appropriated as part of the budget process, provision that Kentucky law applies to interpretation of the agreement and any disputes and that venue shall be Scott County, KY, and a provision that the services cannot be assigned without the prior approval of the City.

A Notice to Proceed will be issued once the agreement has been signed by both parties and all required paperwork herein described is received by the City.

**DELIVERY SCHEDULE:** Delivery date shall be specified on each item quoted. The vendor will be expected to fulfill the delivery as specified.

**PAYMENT:** The proposal must clearly state the payment terms, including prompt payment discounts and payment due dates. Discounts should be figured into the unit price of the quoted item. The City of Georgetown reserves the right to select the most beneficial terms.

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**BONDING:** There is no bonding requirement.

**DEFAULT; TERMINATION OF CONTRACT:** In the event that any of the provisions of this Contract are violated by the proposer such breach shall constitute a default. In the event of a default, the Owner may serve written notice upon the proposer of its intention to terminate the Contract, such notice to contain the reasons for such intention to terminate the Contract, and unless within ten (10) days after the serving of such notice upon the proposer, such violation or delay shall cease and satisfactory arrangement of correction be made, the Contract shall, upon the expiration of said ten (10) days, cease and terminate.

**SAFETY:** The successful proposer must perform work in a safe and timely fashion, maintain a clean and safe work environment, follow safety requirements established by OSHA and the City of Georgetown, and may be required to provide safety equipment. If, in the opinion of the City, safety precautions are not in existence, work will cease immediately until corrective action is taken. Work will begin again only when vendor demonstrates to the satisfaction of the City that conditions are without risk.

**INSURANCE REQUIREMENTS:** The successful proposer covenants and agrees to maintain and keep in force during the term of the contract insurance policies in the following minimum amounts:

<u>Type of Insurance</u>	<u>Limits</u>
Worker's Compensation	Statutory
Commercial General Liability	\$1,000,000/\$1,000,000 CSL
Commercial Automobile Liability	\$1,000,000

On all liability policies of insurance proposer shall have the City named as an additional insured and shall further require that their liability carrier(s) notify the City at least thirty (30) days prior to the effective date of any change(s) in or cancellations of said insurance policies. A current copy of proposer's insurance certificate providing proof of insurance as stated above must be on file in the Purchasing Department prior to the proposal award. Submission of an Evidence of Insurability from your provider or an Insurance Certificate copy may be included with the proposal package.

**HOLD HARMLESS AGREEMENT:** The proposer covenants to save, defend, keep harmless, and indemnify the City of Georgetown and all of its officers, departments, agencies, agents, and employees from and against all claims, loss, damage, injury, fine, penalties, and costs including court costs and attorney's fees, charges, liability, and exposure however caused resulting from, arising out of, or in any way connected with the proposer's negligent performance or non-performance of the terms of the contract.

**CONTRACTOR STATUS:** Proposer understand and agrees that its employees, agents, or sub-proposers are not employees of City of Georgetown for any purpose whatsoever.

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**PROPOSER'S QUALIFICATIONS:** Proposer must demonstrate to the satisfaction of the City of Georgetown that he/she has adequate equipment, personnel, experience and understanding of the specifications to perform service under the contract.

No contract will be awarded to any proposer who, in the opinion of the City, is not qualified to perform satisfactorily due to a previously unfavorable performance, reputation or lack of experience, capital, organization, equipment, and/or personnel to conduct and complete the services in accordance with the terms and conditions of the contract.

Successful proposer must comply with the City of Georgetown ordinances relating to Occupational License Fees, Business Licenses, payroll and net profits and any other ordinances which may apply to any particular proposal package.

**PROPOSER PREFERENCE:** Pursuant to KRS 45A.494, which is incorporated herein by reference: "a resident Proposer of the Commonwealth shall be given a preference against a nonresident Proposer registered in any state that gives or requires a preference to Proposers from that state. The preference shall be equal to the preference given or required by the state of the nonresident Proposer. "

**EQUAL OPPORTUNITY STATUTES:** The City of Georgetown is an equal opportunity employer and does not discriminate on the basis of race, color, religion, sex, national origin, age, marital status, physical or mental disability, or any other characteristic protected by law. The City is also committed to employing only United States citizens and aliens who are authorized to work in the United States. The City complies with the Immigration Reform and Control Act of 1986. Therefore, the successful proposer must demonstrate to the satisfaction of the City that he also conforms to all Federal, State, and Local Equal Opportunity statutes. Further, the contractor will reimburse the City of Georgetown for any damages incurred due to any violation of the above mentioned statutes by the contractor while under contract to the City.

**"OR EQUAL" CLAUSE:** Whenever a material, article or piece of equipment is identified on the plans or in the specifications by reference to manufacturer's or vendors' names, trade names, catalog numbers, etc., it is intended merely to establish a standard; and, any materials, article or equipment of other manufacturers and vendors which will perform adequately the duties imposed by the general design will be considered equally acceptable provided the material, article or equipment so proposed, is, in the opinion of the Owner of equal substance and function.

**AMBIGUITY, CONFLICT OR OTHER ERRORS IN RFP:** If a proposer discovers any ambiguity, conflict, discrepancy, omission or other such error in the RFP, he/she shall immediately notify the City of Georgetown of such error in writing and request modification or clarification of the document if allowable by the City of Georgetown.

**ADDENDA AND INTERPRETATIONS:** **No interpretation of the meaning of the plans, specifications or other pre-proposal documents will be made to any proposer orally.**

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Every request for such interpretation should be in writing addressed to the City Clerk, 100 North Court Street, Georgetown, KY 40324, by Fax to 502-863-9962, or by email to [tracie.hoffman@georgetownky.gov](mailto:tracie.hoffman@georgetownky.gov), and to be given consideration must be received by January 3, 2017 at 10:00AM EST. **Any and all such interpretations and any supplemental instructions will be in the form of written addendum to the specifications which, if issued, will be emailed to prospective proposers and posted to the City's website: [www.georgetownky.gov](http://www.georgetownky.gov).** Failure of any proposer to receive any such addendum or interpretation shall not relieve such proposer from any obligation under his/her proposal as submitted. All addendums so issued shall become part of the contract documents.

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GENERAL REQUIREMENTS

The City of Georgetown is seeking proposals for Customer Relationship Management (CRM) software services to help the City and County manage and analyze citizen interactions with the goal of improving relationships, assisting citizens better and increasing internal work efficiency.

PROPOSAL SUBMISSION

The proposer must submit one original signed hardcopy, and three (3) duplicates.

PRE-BID MEETING

No pre-bid meeting will be held.

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EVALUATION CRITERIA

Every effort will be made to evaluate the proposals as objectively as possible. The best proposal will be determined by Committee that provides the best combination of factors relating to experience, qualifications, service and reputation:

PARAMETER	% WEIGHT
Services to be Provided	45
Qualifications and Experience	25
Price	20
Implementation Schedule	10

EVALUATION COMMITTEE

The Evaluation Committee may include the following:

- City Engineer
- Director of Public Works
- Director of Finance
- City Attorney
- GIS Analyst
- Finance / Legal Specialist
- Scott County Representative
- Other member(s) deemed necessary as determined by the City Engineer

The Committee reserves the right to require written questionnaire responses, telephone interviews, and/or conduct selection interviews with respondent.

**Committee members shall not be contacted by the Proposer during the proposal preparation and selection process, unless otherwise noted herein.**

The Committee shall be the sole judge of the best proposal and the resulting negotiated agreement. The Committee reserves the right to investigate the reputation, integrity, skill, business experience, and quality of performance under similar operations before making a final decision and will be based on both an objective and subjective comparison of the proposal.

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**SUBMISSION REQUIREMENTS**

Proposers shall include their qualifications using the following format:

- 1. Cover Page** with firm's name, address and telephone numbers.
- 2. Cover Letter** which includes a summary of the Proposer's ability to perform the services and enter into a contract with the City. The cover letter must be signed by a person having the authority to commit the agency to a contract.
- 3. Qualifications and Experience**
  - a. Provide evidence that your firm is an authorized Cityworks partner.
  - b. Provide a brief history of your firm, including organizations of the firm and any mergers and acquisitions.
  - c. Provide information identifying principal staff members including and Sub-Consultants that will be directly involved in the project. Provide information including relevant experience and education in providing the required services.
  - d. Describe the experience of your firm in providing CRM related services to government agencies.
  - e. Provide three (3) municipal references for which your firm has performed similar implementations and/or are currently using your services (located within the State of Kentucky is preferred).
- 4. Scope of Services**
  - a. Proposer shall state within their proposal how their software meets the needs stated in the Statement of Needs section.
  - b. Consultant shall also provide or highlight any additional features and/or functionality of their software, not specifically mentioned in this RFP, while describing how it can be used to meet the City's goals.
- 5. Cost – Proposer to use the Proposal Response Form**
  - a. Proposer shall provide a lump sum fee proposal for the implementation, training and any other startup fees not considered annual maintenance.
  - b. Proposer shall provide an annual maintenance cost structure good for five (5) years (all prices to include technical support, software upgrades and any other standard services). If the firm has multiple annual cost structures for number of users and/or an enterprise license, both structures shall be presented with the number of users option being represented as annual cost per one user and enterprise license as a single lump sum. If both structures are offered, the Proposer shall include the breakeven number of users under the per user fee as compared to the single enterprise license fee.
  - c. Proposer shall provide any information detailing all additional costs that may arise with the five (5) year term.
  - d. Proposer shall provide unit costs for additional user training that occurs after the implementation period.

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**6. Implementation Schedule**

- a. Proposer shall provide the proposed project methodology presented in the form of a series of tasks to be accomplished during the project. This shall include a project schedule and milestone expectations.
- b. Proposer shall assume that the start date for said schedule begin on February 1, 2017.

**7. Additional Requested Information**

- a. Please disclose any criminal investigation, indictment, prosecution, or other proceeding that has been brought against your firm within the last ten (10) years (provide attachment if necessary). Also describe any civil litigation pending or concluded within the last five years against your firm that may impair the firm's ability to provide the requested services (provide attachment if necessary).
- b. Disclose any potential conflicts of interest with representing the City of Georgetown for the requested services, including any potential conflicts of interest of employees assigned to this project. The City of Georgetown reserves the unqualified right to disqualify a firm or cancel any contract for any potential conflict of interest issues raised initially and/or during the contract period.

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**SPECIFICATIONS**

**Purpose**

The purpose of this RFP is to solicit sealed proposals to establish a term contract through competitive negotiation for the purchase of an information technology solution and associated services that will enable to City and County to improve their customer service and records management of citizen request and solutions. The solution should streamline service, business processes, and communication with internal and external customers, and integrate Cityworks AMS/PLL (Proposer shall be an authorized Cityworks partner), social media, GIS, and mobile app capabilities, image uploads, and citizen self-service center options. The successful offeror will provide a system that will be utilized by multiple City/County departments and will provide implementation, training, support services and related items in accordance with the specifications and scope of services stated herein. The system will be used primarily by City/County staff with information obtained from various customers. Additionally, the City/County is in the process of improving their 311/211 call center service and it is the intent that the call center use the CRM software when assisting residents. The call center is not a City/County department and would be considered a named user.

**Background**

Scott County is located in Central Kentucky having an estimated population of 50,000 residents which includes the City of Georgetown's population of approximately 33,000. This area is one of the fastest growing areas within the State of Kentucky and the City/County provide a full range of services including general administration, emergency services, public works, facilities management and maintenance, transportation engineering, stormwater management, health and welfare activities and community development activities.

**Current System**

The City currently addresses City issues via phone calls, emails and GovQA (current CRM application). The County addresses issues via phone calls and emails only. The City/County desires to purchase and implement a new CRM system, to replace GovQA, which will provide not only an exceptional level of service but also integrate seamlessly with Cityworks AMS/PLL, provide transparency through the use of publically accessible data formats and provide a method to push notifications to users of important events, emergencies and changes in service. The City is currently in the implementation stage for Cityworks AMS/PLL.

**Statement of Needs**

The City/County seek a civic engagement platform that provides customer relationship management tools to improve citizen engagement, monitor project status, collect and centralize data, create an environment of transparency, integrate seamlessly with Cityworks AMS/PLL and improve customer service. The system will assist service oriented City departments in recording, managing, and analyzing information regarding customer service requests and resolutions.

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**Desired Functionality**

1. CRM software shall provide tools that assist to improve citizen engagement, monitor project status, collect and centralize data and improve customer service.
2. System must have intuitive navigation and streamlined workflows.
3. System must have built-in features that increase staff efficiency including: request/service reminders, resolution confirmations to internal and external customers, service escalation features, interactive mapping tools and web chat functions, etc.
4. System must be able to push notifications or emails to mobile devices of users who have permitted such notifications.
5. System must be able to integrate social media applications.
6. System must allow internal customers to customize and create web forms for citizen feedback and data collection.
7. System must be web-based and installed on a local city/county server or the cloud.
8. System must be accessible via a web based portal integrated into the city/county website and via mobile applications.
9. System must have the availability to integrate with GIS and Cityworks.
10. System must have an input mechanism for staff to log calls and emails.
11. System must have the ability to upload documents, emails, photographs and other files as needed.
12. System must have the capability for individual concerns to be assigned to multiple parties.
13. System must have analytical tools and the ability to create reports on past and present interactions in addition to enhanced query functions.
14. System must have the ability to prioritize and escalate customer service interactions both manually and automatically.
15. System must have the ability to easily change responsible parties.
16. System must have the ability to separate requests from city and county citizens and direct those requests to the related department in either the city or county aka geo-fencing.
17. System must have the option to capture citizen information for the purpose of follow up both manually and automatically.
18. System must demonstrate levels of permissions for users and administrators of the system.
19. System must provide an individually customizable dashboard.
20. Both internal and external users shall have the capability to review service request history.
21. System must provide customizable workflows to help guide employees through the input process.
22. System must have an easily searchable FAQ section.
23. System should have advanced communication mechanisms such as web chat.
24. System should have the ability to hyperlink outside data within service requests.
25. System shall provide the ability to manage records in accordance with the Freedom of Information Act in addition to providing a means to easily respond to such requests.

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- 26. All data shall be in a format and location where it is owned and transferrable (free of charge) to the City of Georgetown and Scott County.
- 27. System must work with the City/County's current email system (Outlook) and website provider (Civic Plus – City & SMI - County).
  - a. <http://georgetownky.gov/>
  - b. <http://scottky.com/>
- 28. System must have the capability to integrate with Cityworks AMS/PLL.

**Contract Period**

The Contract period will begin upon the signing of the Contract by both parties and shall extend for five (5) years.

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AFFIDAVIT

Comes the Affiant, \_\_\_\_\_, and after being first duly sworn under penalty of perjury as follows:

1. His/her name is \_\_\_\_\_ and he/she is the individual \_\_\_\_\_ or the \_\_\_\_\_ authorized representative of \_\_\_\_\_ (hereinafter referred to as "Proposer"), and is authorized to submit the Proposal Response Form, equal opportunity agreement and Vendor's Statement Pursuant to KRS 45A.343 attached hereto and incorporated herein by reference.
2. Proposer will pay all taxes and fees, which are owed to the City of Georgetown at the time the proposal is submitted, prior to award of the contract and will maintain a "current" status in regard to those taxes and fees during the life of the contract.
3. Proposer will obtain a City of Georgetown business license, if applicable, prior to award of the contract.
4. Proposer authorizes the City of Georgetown to verify the above-mentioned information with the Division of Revenue and to disclose that taxes and/or fees are delinquent or that a business license has not been obtained.
5. Proposer has not knowingly violated any provision of the campaign finance laws of the Commonwealth of Kentucky within the past five (5) years and the award of a contract to the Proposer will not violate any provision of the campaign finance laws of the Commonwealth.
6. Proposer has not knowingly violated any provision of Chapter 2 of the City of Georgetown Code of Ordinances, known as "Ethics Act."
7. Proposer acknowledges that "knowingly" for purposes of this Affidavit means, with respect to conduct or circumstances described by a statute or ordinance defining an offense, that a person is aware or should have been aware that his conduct is of that nature or that the circumstance exists.

Further, Affiant sayeth naught.

\_\_\_\_\_  
Affiant

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

The foregoing instrument was subscribed, sworn to and acknowledged before me by \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_, 2016.

My Commission expires: \_\_\_\_\_

\_\_\_\_\_  
NOTARY PUBLIC, STATE AT LARGE

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EQUAL OPPORTUNITY AGREEMENT

The Law

- Title VII of the Civil Rights Act of 1964 (amended 1972) states that it is unlawful for an employer to discriminate in employment because of race, color, religion, sex, age (40-70 years) or national origin.
- Executive Order No. 11246 on Nondiscrimination under Federal contract prohibits employment discrimination by vendor and sub-vendor doing business with the Federal Government or recipients of Federal funds. This order was later amended by Executive Order No. 11375 to prohibit discrimination on the basis of sex.
- Section 503 of the Rehabilitation Act of 1973 states:  
The Vendor will not discriminate against any employee or applicant for employment because of physical or mental handicap.
- Section 2012 of the Vietnam Era Veterans Readjustment Act of 1973 requires Affirmative Action on behalf of disabled veterans and veterans of the Vietnam Era by vendors having Federal contracts.
- Section 206(A) of Executive Order 12086, Consolidation of Contract Compliance Functions for Equal Employment Opportunity, states:  
The Secretary of Labor may investigate the employment practices of any Government vendor or sub-vendor to determine whether or not the contractual provisions specified in Section 202 of this order have been violated.

\*\*\*\*\*

The City of Georgetown practices Equal Opportunity in recruiting, hiring and promoting. It is the Government's intent to affirmatively provide employment opportunities for those individuals who have previously not been allowed to enter into the mainstream of society. In following this commitment to Equal Employment Opportunity and because the Government is the benefactor of the Federal funds, it is both against the Government policy and illegal for the Government to let contracts to companies which knowingly or unknowingly practice discrimination in their employment practices. Violation of the above mentioned ordinances may cause a contract to be canceled and the vendors may be declared ineligible for future consideration.

Please sign this statement in the appropriate space acknowledging that you have read and understand the provisions contained herein. Return this document as part of your application packet.

Proposers

I/We agree to comply with the Civil Rights Laws listed above that govern employment rights of minorities, women, Vietnam veterans, handicapped and aged persons.

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Signature

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Name of Firm

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VENDOR'S STATEMENT PURSUANT TO KRS 45A.343

45A.343 Local Public Agency may adopt provisions of KRS 45A.345 to 45A.460 – Effect of Adoption – Contracts are required to mandate revealing of violations of and compliance with specified KRS chapters – Effect of nondisclosure or noncompliance. (KRS 136 – Corporate taxes; KRS 139 – Sales & use taxes; KRS 141 – Income taxes; KRS 337 – Wage and hour; KRS 338 – Occupational safety; KRS 341 – Unemployment; KRS 342 – Workers Comp.)

The undersigned, as a duly authorized officer of \_\_\_\_\_  
pursuant to KRS 45A.343 states;

1. To the best of my knowledge, information and belief, \_\_\_\_\_  
has not been finally determined to have violated any of the provisions of KRS Chapters 136, 139, 141, 337, 338, 341, or 342 that apply to it within the five year period preceding this statement.

2. \_\_\_\_\_ acknowledges that it will be required to be in compliance with those provisions of KRS Chapters 136, 139, 141, 337, 338, 341, and 342 that apply to it for the duration of the Contract to be entered into with the City of Georgetown, Kentucky.

3. \_\_\_\_\_ acknowledges that if it fails to reveal any final determination of violation of KRS Chapters 136, 139, 141, 337, 338, 341, or 342, or to comply with the applicable provisions of those statutes for the duration of the aforesaid Contract, such shall be grounds for The City of Georgetown, Kentucky to:

- a) Cancel its contract with \_\_\_\_\_, and
- b) Disqualify \_\_\_\_\_ from eligibility for future contracts awarded by The City of Georgetown for a period of two years.

This the \_\_\_\_\_ day of \_\_\_\_\_, 2016.

Firm: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

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PROPOSER RESPONSE FORM

NAME OF FIRM: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

NAME (Type or Print): \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

\* Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

\* Signature certifies the proposed solution and services meet all requirements outlined in this proposal and the vendor will comply with all specified requirements unless exceptions are noted below.

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Proposer Acknowledges receipt of Addendum as noted: (mark N/A if none)

# \_\_\_\_\_ Dated \_\_\_\_\_

# \_\_\_\_\_ Dated \_\_\_\_\_

# \_\_\_\_\_ Dated \_\_\_\_\_

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PROPOSAL AMOUNTS:

Implementation Cost (lump sum) \$ \_\_\_\_\_

Annual Maintenance Cost (lump sum good for five (5) years) \$ \_\_\_\_\_

Per User Annual Maintenance Cost (unit cost – if none write NA) \$ \_\_\_\_\_

Additional Training Fees (unit cost - if none write NA) \$ \_\_\_\_\_

[illegible]

**REQUEST FOR PROPOSALS**  
**Customer Relationship Management (CRM) Software**  
**OPENING:**  
**JANUARY 12, 2017 at 10:00AM EST**

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CHECKLIST FOR REQUIREMENTS

\*\*Initial "\_\_\_\_\_" for all below as indicated or bid may be rejected.\*\*

- \_\_\_\_\_ Proposer received and understands the Request for Proposals Package and Specifications.
- \_\_\_\_\_ Cover Page attached.
- \_\_\_\_\_ Cover Letter attached.
- \_\_\_\_\_ Qualifications, Experience, and References attached.
- \_\_\_\_\_ Fee Proposals attached.
- \_\_\_\_\_ Additional Requested Information attached (if applicable).
- \_\_\_\_\_ PROPOSER RESPONSE FORM completed and attached.
- \_\_\_\_\_ EXCEPTIONS TO SPECIFICATIONS AND/OR COMMENTS completed and attached (if applicable).
- \_\_\_\_\_ AFFIDAVIT signed and attached.
- \_\_\_\_\_ EQUAL EMPLOYMENT AGREEMENT signed and attached.
- \_\_\_\_\_ VENDOR'S STATEMENT PURSUANT TO KRS 45A.343 signed and attached.